



Town of Westford

Strategic Planning Retreat

June 20, 2013 5:30 PM

Kimball Farm

5:15 – 5:30 Registration

5:30 – 5:45 Welcome, opening remarks, and overview of event

Kelly Ross, Board of Selectmen Chair and Jodi Ross, Town Manager

5:45 – 6:30 Facilitated Discussions Session #1 (Concurrent)

- ***Economic Development:*** *Tom Barry, EDC Chair; Ron Caterino, EDC; Eli Demetri, EDC; Chris Kluchman, Director of Land Use Management*

The Economic Development Committee (EDC) began in the summer of 2012, and has been busy with several projects including a Small Business Permitting Guide, an application to the state for designation as an Economic Target Area (ETA), and more. Members of the EDC will talk about their accomplishments and priorities, while seeking feedback from participants on various approaches to future economic development, while carefully maintaining a balance with the town's existing aesthetic character. The EDC is working to support existing businesses, and are exploring the use of state Brownfield Funds, multi-modal forms of transportation, and economic development in an appropriate scale within the five Westford Villages.

- ***Education – Mandates, budget, and other issues:*** *Bill Olsen, School Superintendent, Kathy Auth, Director of School Finance*

As we continue to experience challenging fiscal conditions, we will value an exchange of ideas with community members on the following issues: sufficiently funding annual operating budgets, offering competitive salaries to attract and retain highly qualified staff, continuously reviewing and improving our curriculum, applying the latest technologies to the instructional process, providing full-day kindergarten, providing accelerated learning opportunities for all students, accomplishing important capital improvements to our facilities, and analyzing future residential developments and school enrollments.

6:30 – 7:15 Break for Dinner

7:15 – 8:00 Facilitated Discussions Session #2 (Concurrent)

- ***Town Financial Topics - Capital Planning, Other Post-Employment Benefits, Retirement Assessment, and Bond Rating:*** *Dan O'Donnell, Budget Director; Christine Collins, Treasurer/Collector; Alice Ferro, Town Accountant; Ellen Rainville, Library Director*

This group will examine a variety of the financial issues that will impact the town in FY14 and future years. The discussion will begin by reviewing the five year capital plan and discuss creative ways to prioritize and finance the \$42 million in capital requests with limited available funds. Potential capital discussion will include the town-wide facility assessment study and the possibility of a debt exclusion to fund a portion of the capital. Second, the finance group will

discuss the financial obligations associated with Other Post-Employment Benefits (OPEB) and the Middlesex Retirement unfunded liability, and discuss the implications of several funding scenarios and how they will impact Westford's fiscal stability. Lastly, we will present our most recent bond rating review from Moody's and Standard & Poor's, and discuss the importance of the bond ratings along with analyzing the internal and external factors and that can improve or decrease the ratings.

- ***Emergency Planning/Response, Public Safety, and Town/ School Building Safety and Security:*** *Tom McEnaney, Police Chief; Sandy Collins, Health Director; Bill Olsen, School Superintendent; Rich Rochon, Fire Chief; Joe Targ and Tim Whitcomb, Emergency Management Directors*
This session will include an overview of emergency planning activities currently underway with an opportunity for residents to ask questions and provide feedback about the town's emergency preparation, town and school building safety, and response to storm events and other emergencies.

8:00 – 8:15 Break for Ice Cream

8:15 – 8:30 Final Wrap-up

Each facilitator briefly recaps what was discussed in their session and key concerns or ideas that were raised.

Please note: all retreat materials including follow-up reports are available at: www.westfordma.gov/retreat.